



## MASTER FILE

December 16, 1999

DSSD CENSUS 2000 PROCEDURES AND OPERATIONS MEMORANDUM SERIES # G-16

MEMORANDUM FOR Michael Longini  
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Attention: Decennial Design, Policy and Management Branch

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Subject: Observation Report of Agent Field Trial, Telephone Questionnaire  
Assistance operation, at the National Processing Center

### I. INTRODUCTION

A dress rehearsal for the agent training of the Telephone Questionnaire Assistance (TQA) Operation was held at the National Processing Center from November 8 to 10, 1999. Agents are the people answering the phone at the call centers. Approximately twenty people assumed the roles of agents. Several had prior call center experience. Three instructors covered the program in the latest draft of the training manual.

Attending as observers were personnel from the Decennial Systems and Contract Management Office (DSCMO), Decennial Statistical Studies Division (DSSD), Electronic Data Systems (EDS), and Precision Response Corporation (PRC). EDS is the prime contractor for the TQA operation. PRC is a subcontractor with responsibility for managing several of the call centers which will be used.

The agent field trial was very well run. The DSCMO will work with the TQA contractors to revise the next draft of the training manual. The computer program used in the field trial did not have all the screens which will eventually be incorporated. However, almost all of the most commonly used screens were available. The field trial succeeded in simulating a call center environment albeit at a slower pace than a live operation. A slower pace was required in order to measure the agents' success in learning. A field test demonstration which immediately follows the agent field trial will attempt to match the pace of a live call center environment.

## II. COMMENTS

The instructors were enthusiastic and professionally mannered throughout the training. They used the sound system effectively and so were easy to hear. The first exercise in the field agent trial was for the trainees to fill out actual Census 2000 forms. The goal was to give them some idea of the potential caller's perspective. The rules for observers were clearly stated at the start of the trial. Observers were not to interject themselves into the class in any way.

After filling out forms, the trainees practiced logging into the Operator Support System (OSS), the software which helps the agents answer callers' questions. The following screens were covered on the first day of the trial: ordering replacement forms, answers to frequently asked questions, looking up terms in the Quality Reference Book (QRB), and responses for common caller complaints. The items on the frequently asked questions (FAQ) screen were address problems, concerns and complaints, general questions, and the reason for Census 2000. Also, instruction was provided on how to use the OSS menu features to move between screens.

The trainees role played the following caller problems: receipt of a damaged form, loss of a return envelope, a need for a Spanish language guide, a need for the hearing impaired telephone number, receipt of one form at each of two separate residences, and receipt of a form at a residence in which the current occupants are all visitors. During the role plays, the trainees were told to maintain neutrality. In other words, they are not to answer the callers' questions. Neutrality is achieved by adhering to the OSS script. The callers must decide their own answers based on the information provided by the agent. The trainees were told to read the screen responses verbatim until they reached the end or the caller said a question was answered.

Proper speaking skills were covered. The areas touched on were proper speed, proper volume, proper use of pauses, proper pitch, and the avoidance of a monotone voice. A checklist the trainees could use to monitor proper speaking skills was also presented. After going over the checklist, a tape of a simulated call was played. This was the first of many taped calls that formed an integral part of the entire field trial. The first tape showed an agent relating empathetically to a caller who had not received a form. For purposes of comparing and contrasting, a second tape followed in which the caller who did not receive a form was subjected to an unempathetic agent.

The skills of active listening were practiced next. Tape number three was a call from a person concerned about whether census responses were private. The agent was empathetic, neutral, and prompt in finding an answer. To complement the skills of active listening, the trainees were counseled to not imitate a caller's accent. Also, compound questions—asking two or more questions in the same sentence—confuse callers. The trainees were told to avoid them. The section on active listening was capped off with the

suggestions to paraphrase as a way to confirm understanding and to treat the callers the way the trainees themselves would like to be treated.

As the first day progressed, the trainees became adept at navigating around the OSS. In more than one role play, some students were able to look up the answer before the question had been completely asked. From this point, the role plays increased in quantity and speed.

The transition between instructors was handled very smoothly on the first day and throughout the balance of the field trial. The second instructor on the first day explained how the responses to the various forms were organized into the categories of population, housing, and income. These categories are implemented in the OSS. To reach them the most readily, the agent is prompted to ask the caller for the form and question number that is presenting a problem.

Tape number four consisted of a call from a native of the country of India. The caller was not sure how to answer the ancestry question. The agent in this tape handled the call with good diversity skills, viz. by following the golden rule. Tape number five, in which the same caller receive the opposite treatment from the agent, required no elaboration by the instructor. The trainees understood clearly why the caller in tape five experienced a negative reaction to the agent.

Role play exercises were interspersed with a game called fast ball. The instructor asks a question and the fastest trainee with the correct answer wins a piece of candy as a prize. Fast ball was well received by the trainees. They participated vigorously. A sample fast ball topic is the ten categories of residents on the Census 2000 forms.

On day two of the field trial the trainees practiced asking probing questions. A probing question is a question with only a "Yes" or "No" answer. Agents use them to define more precisely what issues are raised by a caller. They are also used by the agent to confirm the caller has understood an answer.

Tape number six was about a caller who did not know on which part of the form to record answers. The caller spoke with a heavy accent. The agent on the tape made effective use of probing questions. Also, the agent slowed down in pace in order to be easily understood by the caller.

The OSS provides more than one layer of explanation for many topics. The lower the level the more detailed the explanation is. Day two of the field trial saw the role plays cover several detailed requests for information. In some cases, none of the OSS content satisfies a caller. At this point, the agent can say no more information is available or offer the caller the address of the Census Bureau. The instructors emphasized that the agents should not make up their own answers if the caller is dissatisfied with the OSS content.

One trainee commented that it was difficult to navigate between the layers of explanations. This did not appear to be an issue with the majority of the others.

Tape number seven was from an elderly caller needing help to tally the number of rooms in the house and to find the total value of the property. A total of four questions was covered in the call. The agent was forced to use several probing questions. During the role play exercises for the housing questions, the class confirmed an answer could generally be found in more than one section of the OSS. One trainee asked if the phrasing on the OSS could be changed to answer housing questions, but the instructor reminded the class to read the script verbatim. Another trainee experienced difficulty in a role play that referred to a deed of trust. This topic was not referenced in the OSS. It may need to be inserted.

The income question exercises followed the housing ones. In tape number eight, an elderly caller was not sure how to answer the active duty question. The agent demonstrated active listening and slowed down the rate of speaking so the caller could understand the answers. Fast ball exercises followed tape number eight. The trainees successfully answered questions about place of birth, total income, where to record the relationship “nephew”, and whether child support counts as income.

During the field trial, the instructors compiled a list of questions from the students that they could not answer themselves. The questions were turned over to the observers. The answers may be incorporated in future revisions of the training materials. Here is a sampling of the questions: where are the phone numbers for the foreign language agents, are complaints tracked anywhere else besides the complaints menu, how is the gain from a sale of residence handled under income, what is the recovery procedure if the OSS crashes, is jury duty counted in the amount of time worked last week, should the agent try to keep callers on the line if they want to hang up before reaching the close out section of the OSS, and what is the penalty for not responding to Census 2000.

The third day of the field trial went into detail on how to handle callers with complaints. The complaints menu was reviewed. Trainees were shown how to record a complaint that did not fall into one of the predefined categories on the OSS. They practiced looking up the address to which callers should be referred for sending complaints in writing. The instructor told the trainees to not take complaints personally. Role plays involving complaining callers followed.

Another topic on day three of the field trial was the procedure for handling irate callers. Agents should make a good faith effort to calm the caller down to the point of holding a rational discussion. For cases in which callers refuse to cooperate, the script for politely hanging up was explained.

The call control process was covered on day three. The instructor walked through the checklist which covers all the steps an agent should make sure are completed in order to insure a successful call. The instructor followed the call control process with a practice session on how to perform a short form interview.

As with the first two days of the field trial, demonstration tapes were also used on day three to reinforce key concepts of the training.

### III. CONCLUSIONS

The agent field trial used comprehensive, well organized material accompanied by enthusiastic instruction. The several exercises provided ample opportunity to involve the trainees. The demonstration tapes were reasonable in quantity and diverse in the topics covered. They effectively reinforced the instruction. The conduct of the training encouraged the participants to remain fully engaged. When the instructors saw the trainees were catching on quickly in the use of the OSS, the pace of the course was appropriately speeded up.

Further revision of the training materials is planned. DSCMO is planning to observe future training sessions so the maximum consistency across audiences can be achieved. As part of the revision process, the questions not answered by the instructors in the agent field trial should be addressed in future versions of the training manual. At the time of the field trial, some portions of the OSS remained to be programmed. If feasible, the next field trial or actual training session should be scheduled after the OSS is fully programmed. The training manual should be checked for consistency with the OSS. The DSCMO is aware of this need and is preparing to meet it.

On balance, the agent field trial performed on a high plane which should serve as the minimum standard for future trials or training sessions of the TQA operations.

cc:

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